

## Phoenix Program Process Definition – Workflow

Process	<b>Workflow Approval Routing</b>
Process Number	<b>PO-023</b> Revised 8/30/00

### **Description of Process**

Workflow will be used to track PO Amount Approval, PO Chartfield Approval, Requisition Amount Approvals and Requisition Chartfield Approval. Each PO 'Approval' item can only be approved by the PeopleSoft Role user with the authority to approve *up to* a pre-assigned dollar amount within their Route Control Profile. Designated Role users will be assigned the role of Approver 1, Approver 2, and Approver 3 each having a pre-assigned approval amount and Route Control Profile. Route Control Profile is based on two Route Control Types, Business Unit and Origin within that Business Unit.

### **Input to Process**

Purchase Orders and/or Requisitions

### **Output of Process**

Purchase Orders/Requisitions will be in Open, Pending Approval or Approved status based on Operator Preferences and Workflow setup. If Workflow is set to off, the status will populate in as Approved.

### **Service Level Agreement Required? (if yes, provide a brief description)**

N/A

### **PeopleSoft Panel Groups being Used**

Function	Panel Group
Purchase Order Amount Approval	Manage Purchase Orders, Amount Approval
Purchase Order Chartfield Approval	Manage Purchase Order, Chartfield Approval
Requisition Amount Approval	Requisition Items, Amount Approval
Requisition Chartfield Approval	Requisition Items, Chartfield Approval

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### ***Business Process Description***

Process Description	Responsibility (Agency/Centralized)
Purchase Order/Requisition Process	
Step 1 – After creating the Requisition/Purchase Order, change the status to "Approved". If Workflow is being used, the status will change to "Pending Approval" and external Amount and/or Chartfield approval will be required. Otherwise, the status will change to "Approved" and the remainder of this process can be disregarded.	Agency Buyer/Requisitioner
Step 2 – Authorized individual will go into Use – Amount Approval and/or Use Chartfield Approval (if required), review the PO/Req. data and save the panel. The Approval Status will change to Complete.	Approver
Step 3 - If the document is not to be approved, the Approver will change the "Approval Action" to either "Deny" if completely denied, or to "Recycle" if temporarily denied pending some changes. In either case, the approver should enter comments describing why the approval is being denied and any changes necessary to the order so that it can be approved. After comments are entered, save the panel.	Approver
Step 4 – Purchase Order/Requisition can be processed through normal Purchase Order/Requisition procedure once approved.	Agency Buyer

### ***Forms Used with Process (#)***

\*\*Attach sample form(s)    NONE

**Phoenix Program  
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***Process Flow Diagram (if appropriate):***



**Process Signoff**

Tested By  
Date Tested